

Gradient Tax:
Direct Referral
Relationship
Program

Gradient Tax

Model Two of Four

partner with tax professionals

Model Two:



Establish Partnerships

Develop formal relationships

Tax Toolkit

Dozens of marketing & prospecting tools

Grow Your Business

Discover a new source of qualified prospects

Training & Support

Access best practices

Referrals are great. Referrals from professionals are even better. By partnering with a tax professional, you will open the door to new prospects, have a better understanding of your clients' financial situations, and increase your sales per client. It's no secret, top producers rely on their clients' tax returns to generate new business.

Open the door to new prospects

Establish Partnerships

With Gradient Tax, we'll help you develop a formal relationship with tax preparers or CPAs in your neighborhood that will serve as a second engine to drive your business. Imagine how your business will grow when you have other professionals actively encouraging their clients to see you.

Our structured approach utilizes an affinity agreement that includes non-compete, non-solicitation, and compensation structures that will have your partners knocking down doors to send business your way. Our system is built on best practices that truly work.



Take control of **your** prospecting

Tax Toolkit

We have developed dozens of prospecting, marketing, and point-of-sale processes and tools that will drive sales to you.

Most tax preparers record history, and therefore, it's typically too late to improve clients' tax situations. What if you could help prospects make history by reducing the amount of taxes they pay?

With tools that help you identify proper cross-selling opportunities, we'll help you uncover all of your prospects' assets. Our **1040 Analyzer** will help you dissect tax returns, save people money, and position you and your tax partner as a trusted, value-added professional team.

Our tax-specific marketing campaigns will broaden your prospecting arsenal and help you maximize your existing prospecting methods. Imagine using tax planning concepts in concert with your insurance and investments solutions!

Grow Your Business

Here are the facts: your prospects must file their taxes, and chances are someone is doing it for them -- 60 percent, in fact! You'll diversify your prospecting methods, uncover hidden assets from prospects and clients, and help people save money on their taxes. What's not to like about that?

Training and Support

Our team will help you establish a relationship with one or several tax professionals, keep you up-to-date on changing tax laws and taxpayer initiatives that will benefit your clients, and give you the essential documents and best practices that you need to be successful. We'll even help coach you on how to read (and actually *understand*) tax returns through our tax concept training series.

Tax Highlights



Top advisors rely on their clients' tax returns to generate new business.

- Discover a new source for prospecting and identify areas to properly cross-sell new products.
- Build a relationship with tax preparers and CPAs. Set up a reciprocal agreement, non-compete, non-solicit and more.
- Diversify your business while feeding your primary source of revenue.
- Gain access to hands-on training and support. Plus, keep informed of changing tax laws and taxpayer initiatives.